NEW EMPLOYER JOINS VITALITY

Fig 1

Employer	Employee	MH U/W Ops.	MH Systems Dept.

Employer

Complete employer application form including employer level decision – compulsory, voluntary* or disallow Vitality membership for employees

Pass application forms to Momentum Health via intermediaries

Employee

Complete member application form including:
Opt in/out of Vitality.
Existing H&RC membership no. and branch name.
Existing RWFL membership no. and branch name.

Pass application form to employer

MH U/W Ops.

Load application forms. (System automatically checks employee opt in/out decision is in line with employer level decision)
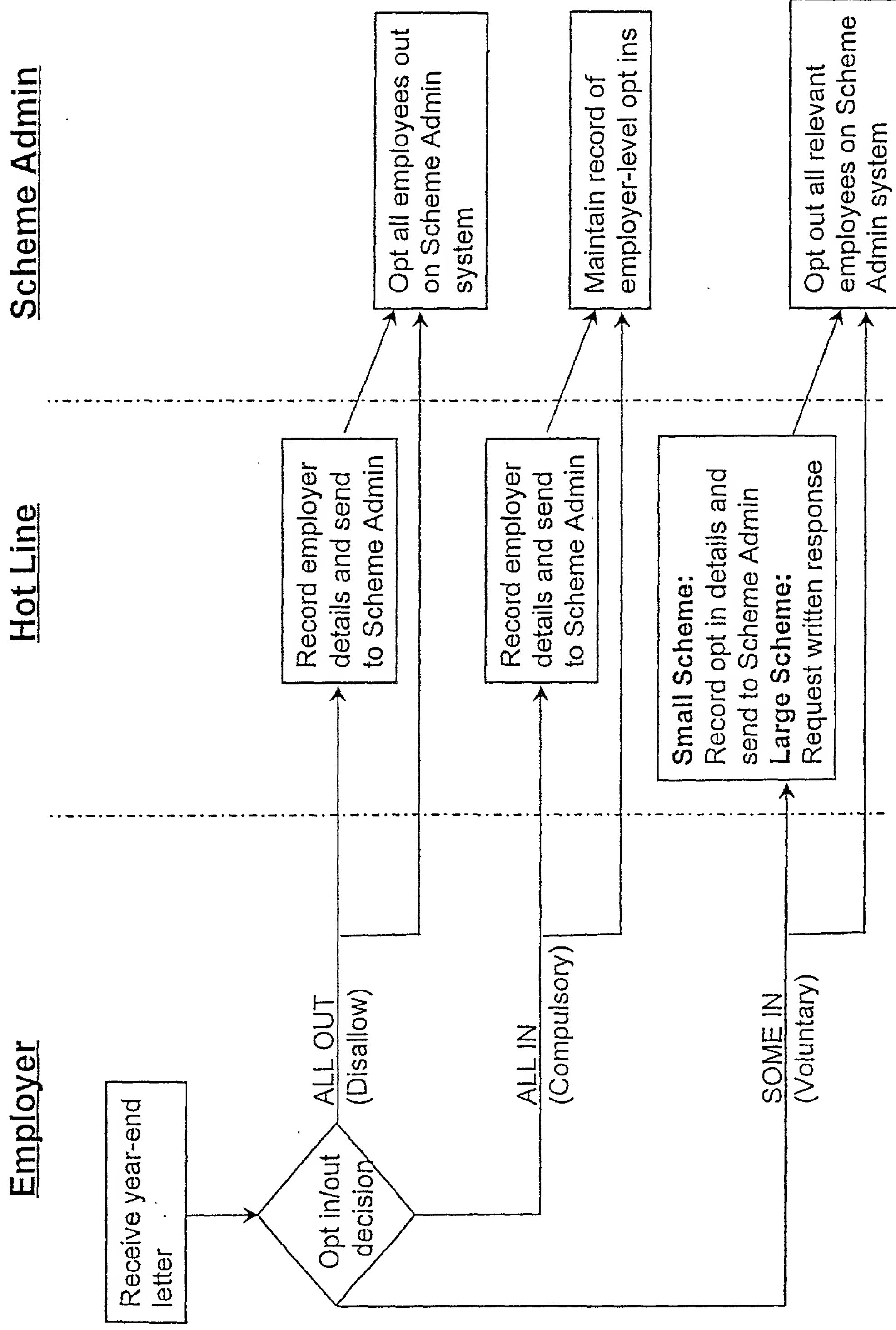
Underwrite and activate employer and employees

MH Systems Dept.

From January '98:
Provide new membership list to Hot Line for H&RC and RWFL membership confirmation – weekly**

**Unless Hot Line has direct access to the Client Services query screens.

*Where employer decision is 'Voluntary' either the employer specifies which employees are opted in or the employer allows employees to specify via the member application forms.

Fig 2

EMPLOYER OPT OUT / OPT IN PROCESS

Employer   **Hot Line**   **Scheme Admin**

Receive year-end letter

Opt in/out decision

ALL OUT (Disallow) → Record employer details and send to Scheme Admin → Opt all employees out on Scheme Admin system

ALL IN (Compulsory) → Record employer details and send to Scheme Admin → Maintain record of employer-level opt ins

SOME IN (Voluntary) → **Small Scheme:** Record opt in details and send to Scheme Admin **Large Scheme:** Request written response → Opt out all relevant employees on Scheme Admin system

CLAIM VITALITY POINTS FOR EXISTING HRC/RWFL MEMBERSHIP

FIG 3

Vitality Member

Call Vitality Hot Line to claim points for principal member's existing HRC/RWFL membership and to score points every time principal or dependant visits HRC or RWFL

Hot Line

Request and record the following:
- Member name
- Employer name
- Member Discovery Card no.
- Member date of birth
- HRC/RWFL membership no.
- HRC/RWFL start date
- HRC/RWFL branch name
- Dependants names (if on Discovery)
- Dependants HRC/RWFL membership nos.

MH Systems Dept.

Download Hot Line data onto Vitality points system monthly checking that people are Vitality members or dependants of Vitality members

Where principal member has existing HRC and/or RWFL membership add score Vitality points against principal member

Add member and dependants to list of people that HRC/RWFL must record visits for

Monthly check with HRC/RWFL that membership details are valid

VITALITY MEMBER/DEPENDANT JOINS HEALTH & RACQUET CLUB

Member/Dependant	Health & Racquet Club	Hot Line (in Client Services)

Member/Dependant

Go to HRC with:
- •ID
- •Discovery Card
- •Joining fee

Health & Racquet Club

Sales:

Principal member or dependant?

Dependant (fee=X% discount)

Principal (fee=R150)

Sales: Ask member/dependant of they have existing HRC membership with over 1 month left to pay off. If they do they cannot join under Vitality (call Hot Line on 0800 11 4024 if they have queries).

Sales: Check and record employer name, name, ID no. and Discovery Card no. If renewing membership record current HRC membership no. Photocopy ID book and Discovery card. Complete contract and accept joining fee.

Debtors Controller: Check contract complete and photocopy of ID and Discovery card is attached. Check that person does not have an existing contract with more that a month to expiration. Enter details of all Vitality members for that day onto Vitality/HRC form. Call Vitality Hot Line with details and arrange to fax form to them or to check membership details over the phone.

Debtors Controller: Reject non Vitality members and refund fees. For genuine Vitality members pass Vitality/HRC form and other documents to Administrator.

Administrator: Enter fee onto banking system and pass documents to MIC

MIC: Enter information onto membership system (including Vitality reference no.) and set membership code to indicate Vitality or Vitality dependant

MIC: Pass HRC membership numbers through to Vitality Hot Line by telephone

MIC: Issue membership

Hot Line (in Client Services)

4

Enter 'Reject' against the persons name on Vitality/HRC form and enter reason e.g. has left Discovery.

N

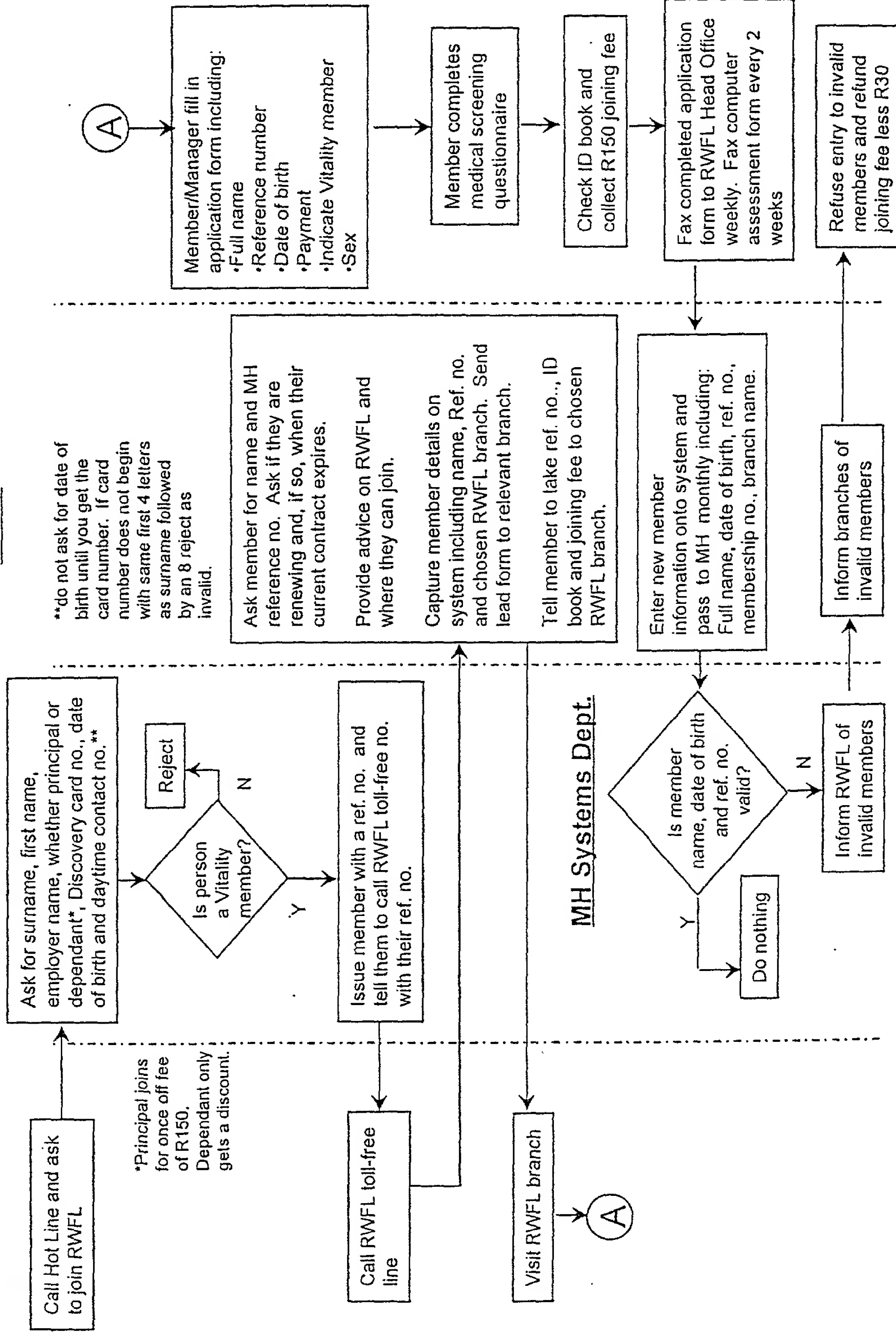Are people listed Vitality members or a dependant of a Vitality member?

Y

Check that details on form are correct including date of birth Reject if incorrect. Otherwise enter HRC details online.
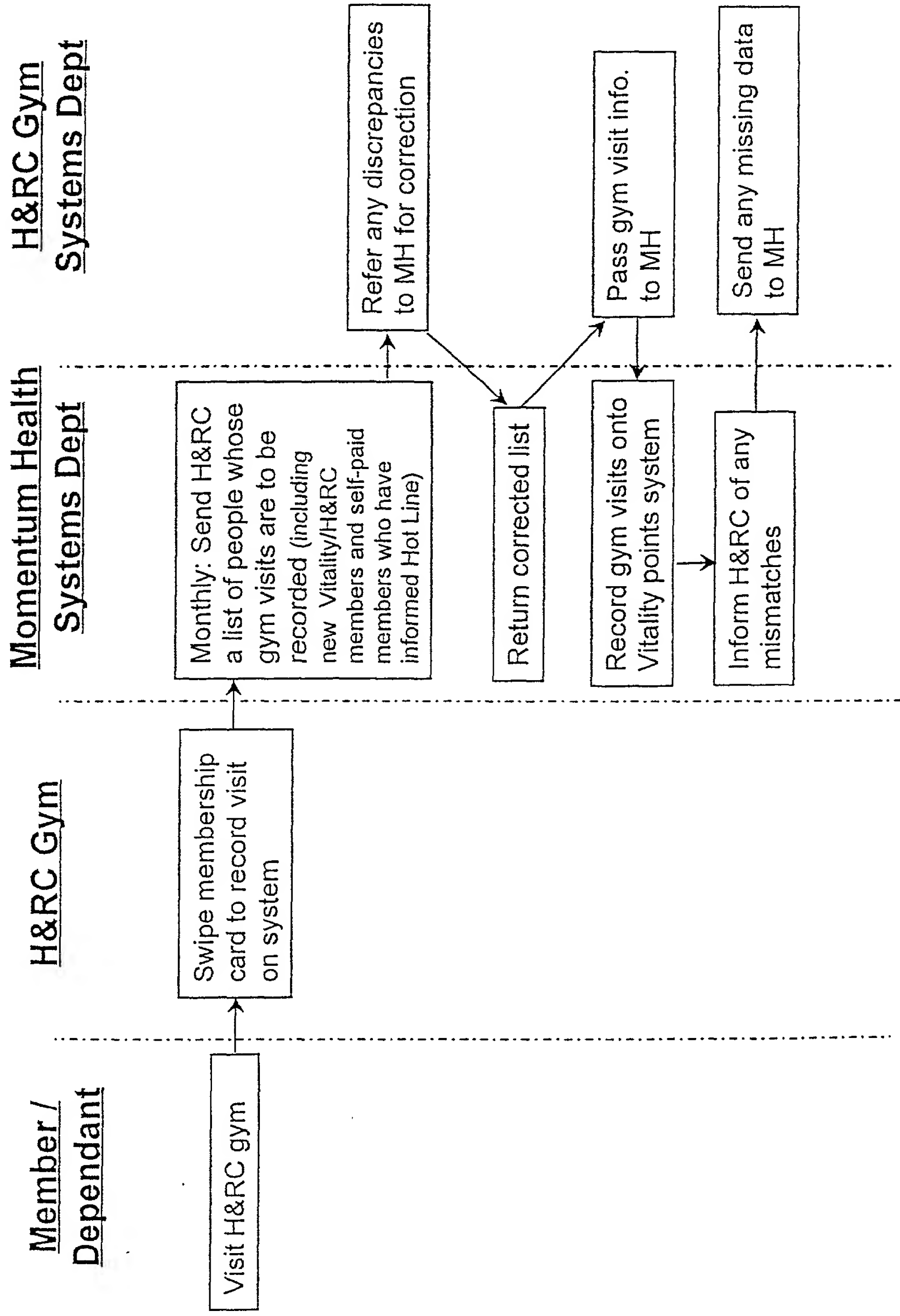
Complete the Vitality form by hand or online including Vitality reference number and fax it back to HRC

Enter HRC membership numbers online and set HRC Membership Code to 1 (Vitality/HRC)

FIG 5

VITALITY MEMBER JOINS RUN / WALK FOR LIFE

Member	Hot Line	RWFL Head Office	RWFL Branch

Member

Call Hot Line and ask to join RWFL

*Principal joins for once off fee of R150. Dependant only gets a discount.

Call RWFL toll-free line

Visit RWFL branch → (A)

Hot Line

Ask for surname, first name, employer name, whether principal or dependant*, Discovery card no., date of birth and daytime contact no. **

** do not ask for date of birth until you get the card number. If card number does not begin with same first 4 letters as surname followed by an 8 reject as invalid.

Is person a Vitality member?

N → Reject

Y → Issue member with a ref. no. and tell them to call RWFL toll-free no. with their ref. no.

RWFL Head Office

Ask member for name and MH reference no. Ask if they are renewing and, if so, when their current contract expires.

Provide advice on RWFL and where they can join.

Capture member details on system including name, Ref. no. and chosen RWFL branch. Send lead form to relevant branch.

Tell member to take ref. no., ID book and joining fee to chosen RWFL branch.

MH Systems Dept.

Enter new member information onto system and pass to MH monthly including: Full name, date of birth, ref. no., membership no., branch name.

Is member name, date of birth and ref. no. valid?

Y → Do nothing

N → Inform RWFL of invalid members

Inform branches of invalid members

RWFL Branch

(A) →

Member/Manager fill in application form including:
• Full name
• Reference number
• Date of birth
• Payment
• Indicate Vitality member
• Sex

Member completes medical screening questionnaire

Check ID book and collect R150 joining fee

Fax completed application form to RWFL Head Office weekly. Fax computer assessment form every 2 weeks

Refuse entry to invalid members and refund joining fee less R30

MEMBER / DEPENDANT VISITS HEALTH & RACQUET CLUB

FIG 6

Member / Dependant

Visit H&RC gym

H&RC Gym

Swipe membership card to record visit on system

Momentum Health Systems Dept

Monthly: Send H&RC a list of people whose gym visits are to be recorded (including new Vitality/H&RC members and self-paid members who have informed Hot Line)

Return corrected list

Record gym visits onto Vitality points system

Inform H&RC of any mismatches

H&RC Gym Systems Dept

Refer any discrepancies to MH for correction

Pass gym visit info. to MH

Send any missing data to MH

FIGURE 7

MEMBER / DEPENDANT VISITS RUN / WALK FOR LIFE

Member / Dependant

- Attend RWFL
- Complete computer assessment form

RWFL Branch

- Fax computer assessment form to head office

RWFL Head Office

- Enter assessment data onto central system and file forms
- Refer any discrepancies to MH for correction
- Pass visit info. to MH
- Send any missing data to MH

Momentum Health Systems Dept

- Monthly: Send RWFL a list of people whose visits are to be recorded:
  - Vitality/RWFL members
  - RWFL/Vitality members
  - Vitality/RWFL dependants
  - RWFL/Vitality dependants
- Return corrected list
- Record visits onto Vitality points system
- Inform RWFL of any mismatches

FIGURE 8 / 8658680

LAPSE AND REACTIVATE H&RC MEMBERSHIP

Vitality/H&RC Member

Scheme Admin

MH Systems Dept.

H&RC

Visit H&RC less than 12 times in a year

Is member self or MH paid?

Self-paid → Do nothing

MH paid → System lapses H&RC membership

Pass Vitality/H&RC lapse data to H&RC monthly

Lapse membership

Visit H&RC gym after membership lapsed

System recognises lapsed member. Carry out joining procedure i.e. call MH Hot Line to check Vitality membership. Charge reactivation fee.

Fig 9

LAPSE AND REACTIVATE RWFL MEMBERSHIP

| Vitality/H&RC Member | RWFL Branch | RWFL Head Office | MH Systems Dept. |

Vitality/H&RC Member

Do not visit RWFL for 4 months

Visit RWFL branch after membership lapsed

RWFL Branch

Do nothing

Is member self or MH paid?

Self-paid

MH paid

Lapse membership and inform RWFL head office

Recognise member is lapsed. Carry out joining procedure. Charge reactivation fee.

RWFL Head Office

Pass Vitality/RWFL lapse data to MH monthly

MH Systems Dept.

Download lapse data onto Vitality system

FIG. 10

SCORE VARIOUS VITALITY POINTS

PRE-AUTHORISATION:

Vitality Member

Pre-authorise in hospital treatment >2 days in advance

Managed Care

Record pre-authorisation details: date of call & date of hospitalisation

MH Systems Dept.

Download pre-authorisation data and allocate Vitality points - monthly

CALL DEMAND MGT LINE:

Vitality Member

Call Demand Management Line

Demand Management Line

Record Discovery card no., employer name, date of birth and date of call

MH Systems Dept.

Download Demand Management data and allocate Vitality points - monthly

UNDERGO TESTS:

Vitality Member

Undergo mammogram or cholesterol screening or Hep. B vaccination. Submit claim.

Claims Assessing

Assess claim

MH Systems Dept.

Download claims data and allocate Vitality points - monthly

Scheme Admin

Momentum Health Systems Department

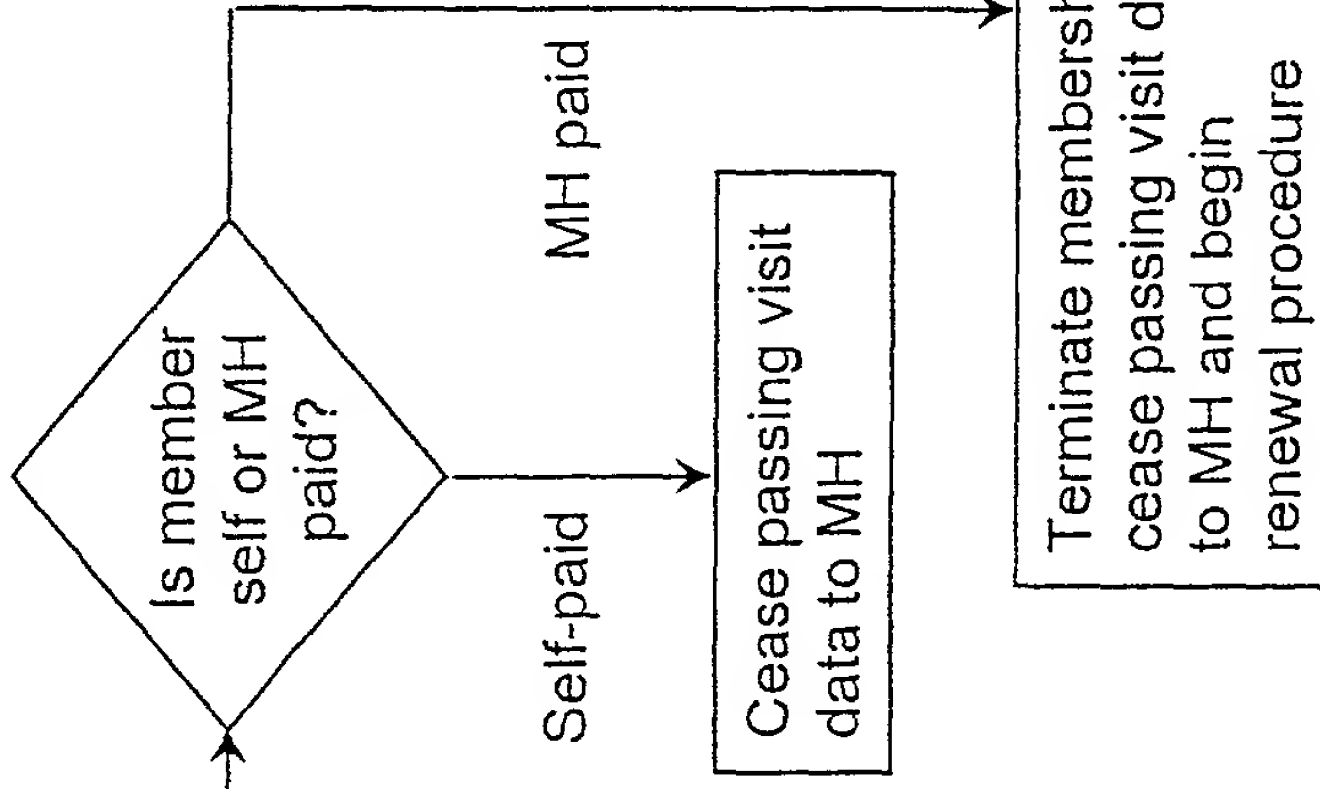**Health & Racquet**

Terminate Vitality membership for all relevant employees on Scheme Admin system

System automatically checks terminated Vitality members and their dependants for membership of HRC and/or RWFL

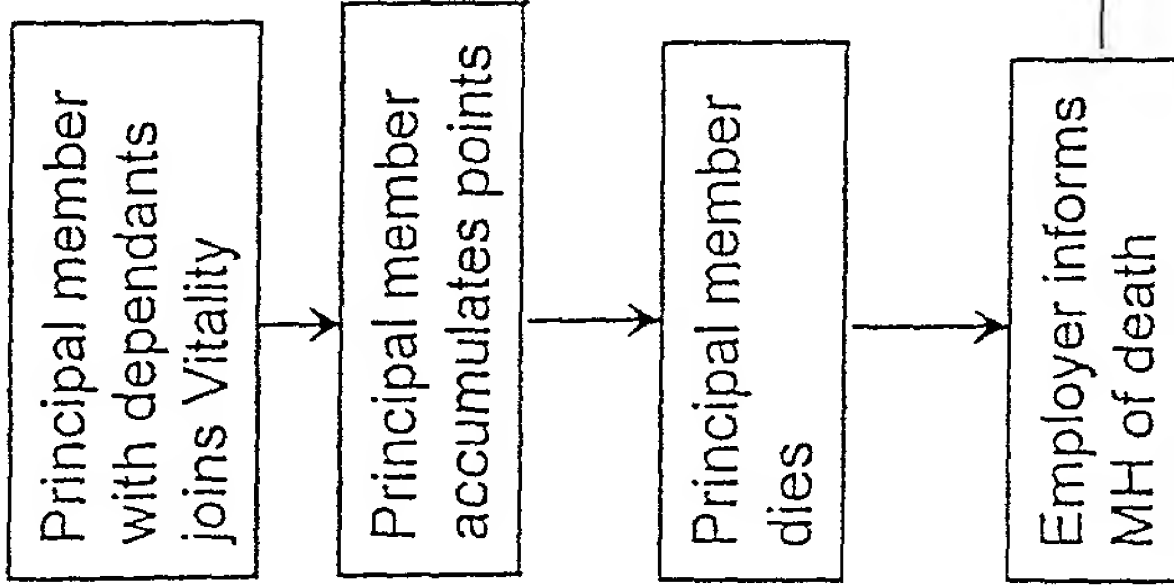Monthly: Pass termination data to HRC and RWFL including:
HRC
•Vitality/HRC members
•HRC/Vitality members
•HRC/Vitality dependants
RWFL
•Vitality/RWFL members
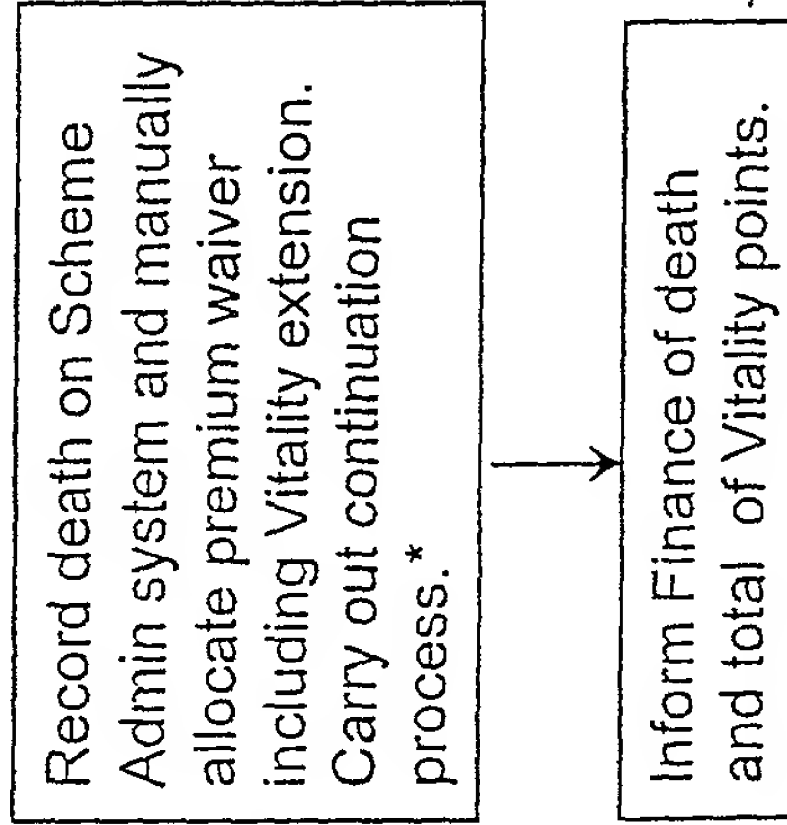•RWFL/Vitality members
•RWFL/Vitality dependants

Is member self or MH paid?

Self-paid

MH paid

Cease passing visit data to MH

Terminate membership, cease passing visit data to MH and begin renewal procedure

PRINCIPAL MEMBER DIES

Principal Member/ Employer

Scheme Admin

Finance Dept.

```
Principal member
with dependants
joins Vitality
      │
      ▼
Principal member
accumulates points
      │
      ▼
Principal member
dies
      │
      ▼
Employer informs
MH of death
      │
      ▼
```

Record death on Scheme Admin system and manually allocate premium waiver including Vitality extension. Carry out continuation process.*

      │
      ▼

Inform Finance of death and total of Vitality points.

      │
      ▼

*Next of kin will continue to build on points accumulated by deceased. However, points system will accumulate points used for death benefit separately so that points will not be double counted for death benefit when next of kin dies.

Calculate and pay Death Benefit to next of kin